TALLYSOFT[®] CUSTOMER RELATIONSHIP MANAGEMENT



We know your customer is your #1 priority. TallySales Customer Relationship Manager is designed to assist you in communicating with your customers. By capturing information at the point of sale, you can easily identify customer buying trends and improve customer satisfaction. TallySales incorporates the customer management features needed to effectively communicate with your customers.

Customer Incentive Discount Plans

With customer incentive discount plans, you can assign automatic discounts to reward your customers for remaining loyal to you. Simply create or modify a plan and select the products that you want to discount. This will save the cashier time and can be used in tandem with Member Cards. You can also set whether the customer is an employee or a Loyalty Program Member.

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Plans General Solf Seven Sprin	General Product Details Benefits Memberships Identification Name Seven Springs Ski Membership Plan Type General			Multi-Member Image: Walti-Member Image: Walti-Member			
	Benefits Sum	(nn% Discount)	*	Activation Only activated in the back office. Sold at POS or activated in the back office. Only sold at POS.			
	Discount only 3 Number of Benefits Discount amt/quantity limit			Expiration Plan expires Expiration Type Year(s)			
				Expiration Factor 1 Plan may be renewed Prompt for renewal at POS if plan within 1 0 day(s) of expiration date. Renewal Plan			

TallyMail / e-Mail

The TallyMail program allows you to create mass mailings to stimulate business or show appreciation to your customers by sending out a birthday wish or thank you letter to new customers. Capturing customer information at the point of sale allows you to sort through your best customers and reward them with coupons or gift cards. An example of a mass mailing you might send is alerting customers about a product recall. By creating your own custom letter, TallyMail gives you a simple and quick solution to send and alert the customers that purchased that product.

For this particular example, the mailing was created to send information to any customer that has purchased an item out of the Snowboard department and Decks category, spending more than \$50.00. The user has chosen to only include customers who purchased any of these items from the previous quarter until now.

nd a Letter Scheduled Letters	
ales Criteria	
Step 1 : Select the first set of criteria based on Store Location and Product.	Step 2 : Select and Identify Sales Criteria
Store	Sales Returns New Customers Lost
All 🔹 All	Select the criteria that reflect the customers
Product Vendor(s)	purchases on dollar, margin and time period
All 🔽 All	that you wish to build a mailing list.
Department(s)	Select the date criteria to determine
Equal to 👻 Snowboard	how much customer sales history to
Product Category	be use. Previous Quarter
Equal to 🔽 Decks	If date criteria is exact then enter
Product(s)	customer history beginning from date
All 🔽 All	
	Total dollars spent by customer is greater than \$ 50
	Margin generated for this customer is greater than % 35
	Note : When margin is selected all products
	with zero cost are dropped from
	customer history

With TallyMail you can easily print labels for targeted mailings, export to Excel for further manipulation, e-Mail or send to an e-Mail marketing program.

Purchasing History

Emails", and more.

Attaching a customer to a sale is very simple and can be done at any time during the sale or even after the sale has been completed. Once a customer is attached to a sale, their purchasing history will be stored for the life of the system or until it is purged by you. If a customer needs to return an item and doesn't have their receipt, you can easily reprint a sales receipt or view previous purchases from as far back as you choose. Layaways, special orders and in-store accounts (with optional finance charges) can also be viewed and reprinted.

General More Info Account Reward Points Plan	Activity									
🧏 Customer Merge 🧾 Journal 🐞 Mailings)=		Customer - K	lennedy, John F.					
Company Name		More Info								
Title				ard Points	Plan Activity					
Last Name Kennedy First Name John M.I. F	Gift Cards 🍇	💐 Gift Cards 🍇 Gift Certificates								
First Name John M.I. F Address 1600 Pennsvivania Ave NW	General Summary	General Summary								
		Last Activity On 09/11/2013 Last Mailing On NA Last Fi Last Sale On 09/11/2013 Last Invoiced On 08/14/2013					nance Charge On NA			
			3 Lasti							
City, State, Zip Washington DC 20500-0034 JFK-2 Shipping A	Summary Year-To-Da	ate tal Sales 6	Summary Season-To-Dat			e Sales 6				
Country UNITED STATES		Amount \$1	nt \$114.95 s 6		Total Sales Am					
Business Phone		Returns 6			Total Ret					
Cell Phone	-	n Amount \$1	01.94		Total Return Am	ount \$101.94				
Fax Phone	Activity									
L-Mail Address	mary Shipping Type Sale			01/01/13 07:00	AM-12/04/13 10:35 AM	•	😵 View			
Do not Post Inventory to GL	Id	Quantity	SKU	Product		Amount	Sale Tax 🔺			
	602010000116		21001000906 21001000488		Classic Glove olf Glove (Black/M Right)	-\$16.99	\$0.00 E			
	602010000116		21001000400	Mill Auf		\$10.00	00.00			
	602010000116	1	011 () =	Custon	ner - Kennedy, J	ohn F.			
		602010000116 1 General More Info Account Reward Points Plan Activity 602010000113 -1 -4								
	602010000113	-	ssianment			Discount				
	602010000113		Customer Type		-	Discount	Plan	-		
Customer Demographi	602010000113	1	Store S	South TallySoft	.(1) -					
Customer Demographi			entification			Point of Sale				
			Id Card			📃 Tax E				
Use Customer Demographics	to define a		Ext Identifier							
customer's default store, sele	ect discount plan.	E	Ext Account No. Checks Accepted Must Verify Hide in look up at register				ity ONot Accepte			
			Agent Number Card On File							
keep their tax exempt information, retain their			Associated Employee			Card Number				
encrypted credit card on file, define a customer			Name Expiration Date							
relationship and oven create			Job Type			Name On (Card			
relationship and even create your own custom			Hire Date			Custom Fields				
demographic fields. These custom fields let you			Customer Relationship			Custom Fiel		Value		
provide an unlimited level of	demographic					Customer DOB	Info	05/29/17		
				reate a relation s the primary.	nship with this customer	Don't Call or	Email			
details that are important to your business; i.e.						Household S	õize			
A ski resort may use custom demographic fields			Secondary Create a relationship with this customer Customer Info			nfo				
for this customers "Boot Size	", "Ski Experience									
Level", "Age", "Do Not Send I	Promotional									



Complete Retail Management Solution

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